



Property Worksheet

LegalZoom Property Worksheet

The Estate of:

Date: / /

I. ASSETS

A. LIQUID ASSETS

Assets that can be easily converted into cash. Examples: money market funds, Treasury Bills, bank deposits, etc.

1. Cash and Dividends

Description	Ownership ¹	Net Value \$ ²

2. Savings and Checking Accounts

Name/Location of Financial Institution	Type	Account No.	Ownership	Net Value \$

3. Money Market Accounts

Name/Location of Financial Institution	Account No.	Ownership	Net Value \$

¹ Ownership: How the property is owned (i.e. joint tenancy, community property, etc.) and/or who owns it.

² Net Value: The amount remaining after certain deductions (i.e. debts) have been made—your “take away” amount.

The Estate of:

Date: / /

LIQUID ASSETS (CONTINUED)

4. Certificates of Deposit

Name/Location of Financial Institution	Account No.	Ownership	Net Value \$

5. Mutual Funds

Name/Location of Financial Institution	Account No.	Ownership	Net Value \$

6. Trust Income

Description	Net Value \$

The Estate of:

Date: / /

B. OTHER PERSONAL PROPERTY

1. Listed (Public Corporation) Stocks and Bonds

Description/Name of Stock or Bond	Ownership	# of shares	Certificate No.	Net Value \$

2. Unlisted (Private Corporation) Stocks and Bonds

Description/Name of Stock or Bond	Ownership	# of shares	Certificate No.	Net Value \$

3. Government Bonds

Description of Bond	Ownership	Certificate No.	Net Value \$

4. Automobiles and Other Vehicles, Including Planes, Boats and Recreational Vehicles

Description	Ownership	Net Value \$

The Estate of:

Date:

/ /

OTHER PERSONAL PROPERTY (CONTINUED)

5. Money Owed You (personal loans, etc.)

Description	Net Value \$

6. Vested Interest in Profit Sharing Plan, Stock Options, Etc.

Description	Beneficiary (if any)	Ownership	Net Value \$

7. Vested Interest in Retirement Plans, Death Benefits, Annuities

Description	Beneficiary (if any)	Ownership	Net Value \$

8. Life Insurance

Insurance Company	Policy No.	Beneficiary	Net Value \$

The Estate of:

Date: / /

OTHER PERSONAL PROPERTY (CONTINUED)

9. Valuable Livestock/Animals

Description	Net Value \$

10. Miscellaneous Any personal property not listed above. Examples: tools, equipment, artwork, collectibles, antiques, jewelry, household goods, etc.

Description	Net Value \$

C. BUSINESS PERSONAL PROPERTY

1. Patents, Copyrights, Trademarks and Royalties

Description	Net Value \$

The Estate of:

Date: / /

BUSINESS PERSONAL PROPERTY (CONTINUED)

2. Business Interests Partnerships, sole proprietorships, corporations, limited partnerships, etc.

Name of Business	Type	Ownership Interests %	Net Value \$

3. Miscellaneous Receivables

Mortgages, deeds of trust or promissory notes held by you; any rents due from income property owned by you; and payments due for professional or personal services or property sold by you that are not fully paid by the purchaser

Description	Net Value \$

D. REAL ESTATE

1. Residential

Location (and Legal Description if known)	Ownership	Mortgage Amount	Fair Market Value of Property

The Estate of:

Date: / /

REAL ESTATE (CONTINUED)

2. Commercial

Location (and Legal Description if known)	Ownership	Mortgage Amount	Fair Market Value of Property

E. TOTAL NET VALUE OF ALL YOUR ASSETS (Add up total "Net Value" of Section I)

\$

II. LIABILITIES *(what you owe)*

Keep in mind that much of what you owe has already been accounted for in Section I above. Since you calculated your worth in terms of "net value," this means you have already taken into account such things as mortgages, business debts and other financial obligations. Therefore, you need only list below those debts and other monies owed that you haven't covered.

A. PERSONAL PROPERTY DEBTS Personal Loans (banks, major credit cards, etc.)

Lender	Type	Interest Rate	Net Amount Owed \$

The Estate of:

Date: / /

PERSONAL PROPERTY DEBTS (CONTINUED)

B. TAXES Include only taxes past and currently due. Do not include taxes due in the future or estimated estate taxes.

Description

Net Amount
Owed \$

C. ANY OTHER LIABILITIES Legal judgments, accrued child support, spousal support, etc.

Description

Net Amount
Owed \$

D. TOTAL LIABILITIES Excluding those liabilities already deducted in Section I.

\$

The Estate of: _____ Date: / /

The Estate of: _____ Date: / /

The Estate of: _____ Date: / /

III. NET WORTH

(Subtract Total Liabilities (Section II.D) from Total Net Value of your assets (Section I.D.)	\$
---	----

(Subtract Total Liabilities (Section II.D) from Total Net Value of your assets (Section I.D.)	\$
---	----

IV. FAMILY AND BENEFICIARY INFORMATION

[illegible]

